

Memo



To: Energy Efficiency & Resource Management Council
From: EERMC Consultant Team
Date: May 18, 2023
Subject: EERMC Consultant Team 1st Quarter Activities Report

CONSULTANT TEAM

This document summarizes the tasks, activities, and deliverables completed by the EERMC Consultant Team (C-Team) from January-March (Q1) 2023. Each item is organized to align with the [C-Team's Scope of Work \(SOW\)](#) which was approved at the December 2022 EERMC meeting.

TASK 1 – Energy Efficiency Program Planning & Implementation Oversight	
1.1 – Council Representation	
Energy Efficiency Technical Working Group (EE TWG)	Participated in energy efficiency technical working groups in February and March. Topics included: <ul style="list-style-type: none">• Preview of Electric Resistance to ASHP Plan Filing• EERMC Priorities for 2024-2026 EE Plans• Company plan for customer listening sessions to inform 3-Year Plan• Draft Market Potential Study Refresh Results• Potential conversion to a Binding 3-Year Plan
Equity Working Group (EWG)	No EWG meetings were held in Q1.
1.2 – Plan Development and Oversight	
Residential and Income Eligible Sector Strategy & Program Oversight	Conducted monthly Residential Sector Team Meetings and shared key outcomes from each with OER, Division staff, and C-Team subject matter experts. Meeting topics included: <ul style="list-style-type: none">• Electric Resistance to ASHP Plan• Meetings topics brainstorm for the year and for planning• Contracts of vendors delivering programs• Commitments tracker updates for 2023• Transition of Online Marketplace• 2022 Year-End Program Performance• 2024-2026 Plan Deep-Dive Meeting Planning Conducted monthly review and analysis of program data from RI Energy and shared monthly data report with OER, Division staff, and RI Energy.
C&I Sector Strategy & Program Oversight	Conducted monthly C&I Sector Team Meetings and shared key outcomes from each with OER, Division staff, and C-Team subject matter experts. Meeting topics included: <ul style="list-style-type: none">• 2022 Year-End Program Performance• New Initiatives for 2023• 2023 Annual Plan Commitments• C&I Data Reporting Improvements• 2024-2026 Plan Deep-Dive Meeting Planning

	Conducted monthly review and analysis of program data from RI Energy and shared monthly data report with OER, Division staff, and RI Energy.
Evaluation, Measurement, and Verification	<p>Conducted five Residential and C&I EM&V meetings to discuss progress on ongoing studies, the application of recent study results to planning and implementation tools, and leveraging study results in other jurisdictions for cost efficiency.</p> <p>Reviewed documents for 9 EM&V studies, including workplans, site reports, preliminary results and update memos, and full evaluation reports. Studies included:</p> <ul style="list-style-type: none"> • Measure Life Study • Program Year 2018/2019 Custom Electric Impact Evaluation • Program Year 2020 Custom Electric Impact Evaluation • Residential New Construction Baseline Study • RI Workforce Needs Assessment • Small Business Program Process Evaluation • C&I Free Ridership and Spillover Study • EnergyWise Single-Family Weatherization Impact Evaluation • Participation Study Dashboard Update
Annual Plan Development	<p>Began initial scoping of timing and needs for 2024-2026 Plan Development, including drafting lists of potential deep dive topics.</p> <p>Prepared, drafted, and finalized Council Priorities for 2024-2026 Plan</p>
Stakeholder Engagement	Engaged stakeholders in conversations, including during technical working groups, and considered public comment received by the Council during EERMC monthly meetings.
1.3 – Education Initiative	
Education Committee	<ul style="list-style-type: none"> • Planned and facilitated two monthly meetings (2/15, 3/1) • Supported meeting discussions through document preparation and completion of follow-up tasks • Reviewed meeting minutes prepared by OER • Developed budget/RFP timeline to assist with planning and execution of multiple concurrent projects • Supported development of 2024 education budget through facilitated discussions with Education Committee • Managed consultant work (GBRI, URI, Advocacy Solutions) including regular correspondence and check-in calls • Reviewed and facilitated processing of consultant/vendor invoices • Contributed, reviewed, and compiled content for consultant deliverables
Public Events	<ul style="list-style-type: none"> • Supported OER in contract process and monitored project timeline • Kicked off 2024 public events activities with URI Cooperative Extension • Facilitated brainstorming discussions, reviewed and organized feedback on public forum proposal
Video Series	<ul style="list-style-type: none"> • Prepared videos for uploading (designed cover images, inserted in-video links and end cards, wrote descriptions) • Uploaded completed videos to YouTube and created playlist; Created dedicated videos page on EERMC website

K-12 Educator Training	<ul style="list-style-type: none"> • Facilitated discussion and evaluation of 2022 outcomes and approach with GBRI and Education Committee
Energy Expo at the RI Home Show	<ul style="list-style-type: none"> • Participated in Energy Expo planning meetings (1/6, 1/17, 2/10, 3/3); Communicated regularly with organizers from RIBA, OER and RI Energy • Contributed copy and content for website, show program, and other marketing materials • Solicited and incorporated ideas and input from Education Committee • Led planning and coordination of recurring energy seminar featuring Professor Stephen Porder • Created and printed new large format educational poster for display OER/EERMC table • Coordinated filming of energy expo promo video featuring Sue AnderBois
Brand & Communications	<ul style="list-style-type: none"> • Supported OER in contract process and monitored project timeline • Coordinated initial series of project kick-off meetings with Advocacy Solutions, OER, and EERMC

TASK 2 – System Reliability Procurement

2.1 – Council Representation

System Reliability Procurement Technical Working Group (SRP TWG)	The SRP TWG met three times in Q1 2023. Meeting topics focused on developing and discussing a framework for applying Expected Valuation to the benefit-cost analysis of non-wires alternatives. TWG members reviewed the concept and worked through an applied example to ensure full understanding.
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2.2 – Plan Development and Oversight

Technical Support for Development of SRP Plans	The SRP Plan is developed as a single three-year plan, which is slated for drafting and finalization later this year. In Q1, the document itself was not ready for review, but the timing and review process expectations were discussed with TWG stakeholders.
SRP Implementation Oversight	SRP implementation oversight activities primarily related to engagement with RIE SRP staff regarding technical materials and methodological advancements for NWA BCA screening.

TASK 3 – Regulatory Proceedings

3.1 – Council Representation

PUC Technical Sessions, Hearings & Open Meetings	<ul style="list-style-type: none">• Participated in meetings with PUC staff related to compliance filings for the 2023 EE Plan• Participated in meetings with PUC staff related to Council’s timeline for filing 2024-2026 EE Plan Targets• Represent Council in Future of Gas Docket meetings
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3.2 – Develop and Review Technical Materials

2023 EE Plan Docket	<ul style="list-style-type: none">• Review and conduct analysis on materials related to 2023 EE Plan compliance filings and its impact on the Council’s available budget allocation
2024-2026 EE Plan Targets	<ul style="list-style-type: none">• Prepare target filing extension request materials
LCP Standards Update	<ul style="list-style-type: none">• Review timeline of LCP Standards update from 2020• Review PUC proposed edits to LCP Standards
Future of Gas Docket	<ul style="list-style-type: none">• Review docket materials, including scope, to inform participation in docket• Draft statement of intention to participate in docket on behalf of Councilors Oakley and AnderBois

TASK 4 – Council Sponsored Meetings & Materials

4.1 – Meeting Attendance

EERMC Meetings	<p>Presented C-Team meeting materials, provided technical support, and engaged in Council discussions during the following EERMC meetings:</p> <ul style="list-style-type: none"> • January 19, 2023 • February 16, 2023 • March 16, 2023
EERMC Executive Committee Meetings	<p>The EERMC Executive Committee convened on January 19, 2023, and discussed a range of topics including:</p> <ul style="list-style-type: none"> • Initiated Council By-Laws Review • Review of Council Member Performance, Attendance, and Codes of Conduct • 2023 EE Annual Plan Docket Update • Discuss possible Council Meeting Special Topics and spring LEAD Session agenda

4.2 – Develop Materials

Develop Materials	<p>Developed and/or supported development of 22 presentations, memos, and other documents to serve as EERMC meeting materials including:</p> <p>January</p> <ul style="list-style-type: none"> • Rhode Island Energy 2023 EE Plan Updates Presentation • 2023 EE Plan Regulatory Updates Presentation • EERMC 2024-2026 Plan Priorities Presentation • EERMC 2024-2026 Plan Priorities Memo • Market Potential Study Updates Presentation • 2023 Key Deliverables and Schedule Presentation • Consultant Team Technical Working Group Memo <p>February</p> <ul style="list-style-type: none"> • 2023 EERMC Policy Recommendations Presentation • EERMC 2024-2026 Plan Priorities Presentation • EERMC 2024-2026 Plan Priorities Memo • EERMC 2024-2026 EE & SRP Target Setting Presentation • Market Potential Study Updates Presentation • EERMC 2023 Budget Presentation • 2023 EERMC Calendar • EERMC 2024-2026 Plan Priorities Memo Redlines <p>March</p> <ul style="list-style-type: none"> • 2022 EE Q4 Presentation • EERMC 2024-2026 Plan Priorities Presentation • EERMC 2024-2026 Plan Priorities Memo • Market Potential Study Updates Presentation • Proposed Council Bylaws Updates Presentation • Council Bylaws Proposed Redlines • 2023 EERMC Annual Report and Policy Recommendations Presentation
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4.3 – Other Council Responsibilities

EERMC Annual Report	Initiated planning and development of 2023 EERMC Annual Report in coordination with RI Energy and OER
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Combined Heat &
Power Meeting

Initiated planning for the 2023 Annual Combined Heat & Power Stakeholder Meeting

TASK 5 – Research, Analysis & Other Council Support

Councilor Briefings	Supported 1-on-1 and 2-on-1 Councilor briefings as requested by EERMC members. Covered topics including conclusion of 2023 Plan Docket, early implementation efforts, the Three Year Plan development process, Three Year Plan Priorities, and 2023 policy considerations, as well as ensuring Councilors who were unable to attend meetings were fully briefed, upon request.
Research and Analysis	<ul style="list-style-type: none">• Support and review of Market Potential Study Refresh study results finalization• Researched and developed recommendations on appropriate valuation of carbon benefits in EE programs
Other Council Support	<ul style="list-style-type: none">• Monitored activities related to update to Avoided Energy Supply Component study• Monitored legislative items, included Governor’s budget proposal and its potential impact on EE programs• Supported review and updates to EERMC ByLaws• Monitored activities related to the PUC’s Storage Docket

TASK 6 – Administrative

Meeting Coordination & Logistics	Initiated planning and coordination of 2023 EERMC Learning, Education & Advancement Discussion (LEAD) Sessions
EERMC Website	Created dedicated videos page on EERMC website
EERMC Intern	Conducted interviews for 2023 Mike Guerard Energy Fellow
Quarterly Progress Reports	Completed and submitted written report documenting C-Team activities for Q4 in advance of the March Council Meeting.

TASK 7 – EERMC Intern

Internship	The Mike Guerard Energy Fellow for 2023 begins in May so there is no activity to report in Q1.
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